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From: Presidency
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Subject: Draft Council conclusions on the competitiveness of the tourism sector as a driver for growth, jobs and social cohesion in the EU for the next decade

Delegations will find attached a revised Presidency proposal for draft Council conclusions on the competitiveness of the tourism sector as a driver for growth, jobs and social cohesion in the EU for the next decade with a view to the discussion by the Working Party on Competitiveness and Growth (Tourism) at its meeting on 25 March 2019.

Changes compared to document 6892/19 are indicated in **bold underlined** for additions and in ~~strikethrough~~ for deletions.

**DRAFT COUNCIL CONCLUSIONS ON THE COMPETITIVENESS
OF THE TOURISM SECTOR AS A DRIVER FOR GROWTH, JOBS AND
SOCIAL COHESION IN THE EU FOR THE NEXT DECADE**

THE COUNCIL OF THE EUROPEAN UNION,

RECALLING

- the Communication from the Commission on "Europe, the world's No 1 tourist destination - a new political framework for tourism in Europe" of June 2010¹ and the Council conclusions of October 2010 on this Communication²;
- the Communication from the Commission on "A European Strategy for more Growth and Jobs in Coastal and Maritime Tourism" of February 2014³ and the Opinion from the Committee of the Regions of October 2014⁴;
- the Communication from the Commission entitled "Towards an integrated approach to cultural heritage for Europe" of July 2014⁵ and the European Framework for Action on Cultural Heritage of December 2018⁶;
- the Council conclusions of December 2014 on "Strengthening tourism by leveraging Europe's cultural, natural and maritime heritage"⁷;

¹ Doc. 11883/10.

² Doc. 14944/10.

³ Doc. 6875/14.

⁴ Doc. CDR 2645/2014.

⁵ Doc. 12150/14.

⁶ Doc. 15343/18.

⁷ Doc. 16535/14.

- the Communication from the Commission on "Investing in a smart, innovative and sustainable Industry - A renewed EU Industrial Policy Strategy" of September 2017⁸ and the Council conclusions of May 2017, November 2017, March 2018 and November 2018 on EU industrial policy strategy⁹;
- the Opinion from the Committee of the Regions of December 2016¹⁰;
- **the 2030 Agenda for Sustainable Development Goals adopted by the United Nations General Assembly and the UNFCCC 10 Paris Agreement within the United Nations Framework Convention on Climate Change;**
- [the outcome of the Ministerial conference on "Sustainable Tourism - Common Policies of EU Member States", Bucharest, 2 April 2019,]

WITH DUE REGARD TO the respective spheres of competence of Member States and the Commission, as well as the principles of subsidiarity and proportionality,

1. STRESSES that tourism is **one of the** key sectors of the European economy, with an increasingly positive impact on economic growth, regional development and employment in Europe, accounting for **more than** 10.3% of EU GDP and **11.7 almost 12%** of the total labour force¹¹; **ACKNOWLEDGES the strong resilience of the tourism sector which has significantly contributed to the EU's recovery from the last economic crisis;**

⁸ Doc. 12202/17.

⁹ Docs. 9760/17, 15223/17, 7037/18 and 14832/18.

¹⁰ Doc. NAT-VI/009.

¹¹ Direct and indirect contribution, World Travel & Tourism Council, 2018.

2. UNDERLINES that Europe ~~the~~ **the European Union** is the world's number one tourist destination, with a ~~current~~ market share **in 2018** of more than 50 %¹² **40%**¹³, whereas the number of international tourists arriving in the EU is forecast to increase by 9 million each year until 2030¹⁴ **and international arrivals amounting to 562 million after the ninth consecutive year of sustained growth**; **HIGHLIGHTS that the largest market for tourism in Europe consists of intraregional and interregional tourism**¹⁵;
3. EMPHASISES that, as part of smart specialisation strategies, **cross-sectoral innovation, including in the** ~~tourism-driven growth can~~ **sector, contributes to the** ~~revitalisation of~~ local economies and ~~contribute~~ to regional cohesion across the EU, and that in particular tourism can be a key strategic sector with economic potential for less developed regions;
4. ACKNOWLEDGES that tourism contributes to strengthening our shared European ~~identity~~ **values** and REAFFIRMS that tourism has to be managed and developed **by the competent authorities** in a **professional and** sustainable way to preserve the EU's cultural, **industrial** and natural heritage for future generations and in respect of local communities; **UNDERLINES the importance of synergies between tourism and culture and their contribution to economic growth and employment and to keeping Europe's position as a top tourist destination**;
5. STRESSES the importance of a well-functioning Single Market, including its digital dimension, **and of ensuring safe and competitive services to all beneficiaries** for the **further** development of the tourism sector, especially for **micro**, small and medium-sized enterprises (SMEs); RECOGNISES the key role played by SMEs in the tourism sector and their specific needs for a favourable business environment, **a global level playing field and a predictable legislative framework**;

¹² ~~European Union Tourism Trends – UNWTO & DG GROW, 2018.~~

¹³ **UNWTO World Tourism Barometer-January 2019**

¹⁴ ~~UNWTO – Towards Tourism 2030, 2011.~~

¹⁵ **European Union Tourism Trends - UNWTO and Commission DG GROW, 2018.**

6. HIGHLIGHTS the ~~importance~~**impact** of developing new business models in the tourism sector ~~and~~, **whilst recognising the requirements of traditional forms of tourism enterprises and their efforts in managing the digital transformation process;** **EMPHASISES the need** of promoting and supporting all tourism services and providers along the tourism value chain with the aim of achieving a balanced and sustainable development **in the Single Market**; ~~in this context, enabling citizens and entrepreneurs to make use of the opportunities offered, while addressing justified concerns in an appropriate manner is likely to promote the sustainable and balanced long-term growth of collaborative~~**ENCOURAGES the Commission and Member States to provide more clarity and legal certainty regarding the rules applicable to the collaborative economy including with respect to** short-term accommodation rental services ~~in the EU~~¹⁶, **and therefore INVITES the Commission to pursue the follow-up of its communication of June 2016 on "A European agenda for the collaborative economy"**¹⁷;
7. RECOGNISES the crucial importance of the development of appropriate infrastructures **to favour connectivity among destinations, as well as knowledge** and smart investment **models** to facilitate innovation and the uptake of advanced technologies in the tourism sector; **STRESSES the need for adequate support to improve digitalisation in order to achieve a more competitive, sustainable and effective offer and to enable competent authorities to quickly obtain high-quality statistical data to support efficient and effective decision-making processes and to address safety issues regarding the registration of tourists;**
- 7a. TAKES NOTE OF the positive impact of the current COSME programme to the tourism sector and ENCOURAGES the continuation of this support during the next multiannual financial framework (MFF) period in association with the future relevant EU programmes, without prejudice to the ongoing negotiations on the next MFF;**

¹⁶ ~~Summary of Workshops on short-term accommodation rental services, organised by the Commission in 2018.~~

¹⁷ **Doc. 9911/16.**

8. EMPHASISES the ~~necessity~~ **benefits** of seeking and exploiting synergies between tourism and other **relevant** sectors, such as cultural and creative industries, crafts, food and ~~drink~~ **beverages**, transport, construction, **spatial** and urban planning, ICT/advanced technologies, **maritime, agriculture**, sport, recreation, education and health **care**;
9. ~~EMPHASISES~~ **UNDERLINES** the importance of skills ~~forecasting~~ **gap anticipation** and skills development for tourism professionals at all levels, **especially in digitalisation**, as ~~a~~ **one of the** key factors **for** the competitiveness, quality of jobs and career development opportunities in the tourism sector;
10. NOTES that the EU tourism sector is facing increasing global competition from third countries, in particular from emerging travel markets with a higher growth rate ~~forecast~~, and **UNDERLINES** that ~~the EU~~ **Member States** should therefore capitalise on ~~its~~ **their** rich and diverse cultural and natural assets and offer **combined with** sustainable, innovative and high-quality tourism services, as ~~a~~ **the main** competitive advantages **of the Union** ~~EU~~; further **RECOGNISES** that **effective** smart and green investment **by the competent entities** will be required in the next years to ~~ensure~~ **strengthen** the competitiveness and sustainable growth of the **entire** tourism sector **in the EU**;
- ~~11. UNDERLINES the importance of cooperation at EU, national, regional and local levels in line with the principle of subsidiarity;~~
12. **ACKNOWLEDGES**, in light of the above, that the EU tourism sector faces shared challenges and opportunities, which will impact its development for the next years, ~~in particular related to:~~
- ~~— sustainability, including resource efficiency, circular economy, seasonality and the management of increasing tourism flows;~~
 - ~~— innovation and digitalisation, including the sharing economy;~~
 - ~~– skills, competences and the quality of jobs;~~

- 13.—ENCOURAGES Member States to give due consideration to these challenges **and opportunities** when developing national, regional and local tourism strategies and to promote responsible **and sustainable** tourism policies and practices ~~in line with the principles of the Global Code of Ethics for Tourism adopted by the United Nations' World Tourism Organization and in accordance with the Sustainable Development Goals;~~
14. CALLS ON Member States and the Commission, within their respective spheres of competence ~~and with due regard to the subsidiarity and proportionality principles,~~ to:
- a. facilitate cooperation, in particular **through** the exchange of good practice in tourism, in line with Article 195 of the Treaty on the Functioning of the European Union, ~~in particular keeping in mind the challenges and opportunities mentioned in paragraph 12 above;~~
 - b. encourage the inclusion of tourism in smart specialisation strategies, where this builds on a region's assets and human capital; **as well as** encourage cross-innovation ecosystems and synergies between tourism and other policy fields, ~~such as cultural and creative industries, sport, education and training, ICT/advanced technologies, as well as networking and partnerships between private and public actors and also non-governmental organisations, social partners, and across different levels of governance;~~
 - c. **develop networks and partnerships between private and public actors, including non-governmental organisations and social partners, and across different levels of governance, and** foster cross-border and inter-regional cooperation to ~~promote~~**encourage sustainable** tourism-driven growth **development** based on the EU's cultural and natural resources, including those of the rural areas;

- d. encourage European-wide dialogue and exchange of best practice among Member States to develop innovative approaches, **including in smart tourism**, for the balanced management of growing tourism flows to European destinations and to foster the transition of European tourism from a model ~~of~~ **focused on** quantitative growth to a ~~qualitative~~ **quality-based model approach** leading to sustainable development and quality jobs;
- e. engage in initiatives promoting the image of Europe as a tourism destination of excellence with regard to the **safety and** quality of its services and the uniqueness of its regions, **including sustainable tourism models for emerging destinations and protected areas**;
- ea. pursue policies and actions to ensure sustainable, seamless and intermodal connectivity to tourism destinations, in particular for potentially attractive smaller and remote areas**;
- f. ~~create incentives to~~ **promote solutions** encouraging European citizens to spend their holidays throughout the EU, including in the lesser-known **and remote** destinations **with high tourism development potential**;
- g. ~~encourage the development of education and vocational training measures which improve skills of employees and employers in the tourism sector, including digital skills, taking into account~~ **build on** the strategic work on sectoral skills development under the Blueprint for Sectoral Cooperation on Skills¹⁸ in tourism¹⁹ **aiming inter alia at encouraging the development of education and vocational training to improve interdisciplinary skills of employees and employers in the tourism sector, including digital skills**, and the exchange of best practice among Member States;

¹⁸ <https://ec.europa.eu/social/main.jsp?catId=1415&langId=en>

¹⁹ <https://nexttourismgeneration.eu/>

- h. engage actively with the tourism sector and **relevant** stakeholders, in particular SMEs, to ~~deliver more services digitally and to remove unnecessary barriers to innovative market entrants~~ **seize the opportunities offered by the digital economy;**
- i. ensure that new **legal** initiatives **at EU and Member State level** ~~in the area of~~ **that affect the** tourism **sector** clearly provide added value, by setting out a favourable environment for the competitiveness of the EU's tourism sector, while avoiding to ~~impose~~ unjustified **and disproportionate** additional burden on businesses, especially on SMEs;
 - ia. ensure the timely information on ongoing EU legislation affecting tourism and foster a European-wide dialogue;**
- j. consider the possibility of designating a European Year of Sustainable Tourism, which may help to promote the diversity of European tourism and raise the profile of lesser-known tourism destinations;

15. ~~CALLS ON~~ **INVITES** the Commission to:

- undertake an in-depth analysis of the recent developments and future trends in the tourism sector, ~~in particular giving due consideration to~~ **the** ~~its~~ challenges and opportunities ~~mentioned in paragraph 12 above, and;~~
- in light of this analysis ~~to update,~~ **taking as a reference** the Communication **of 2010**, ~~on "Europe, the world's No 1 tourist destination – a new political framework for tourism in Europe"~~ with the aim of developing, by the end of 2020, a European Strategy for T**and with the active participation and contribution of Member States and relevant stakeholders, elaborate a new Communication on** tourism with a vision for 2030 **that will allow the EU to maintain its position as world leader in this sector;**

~~16. ENCOURAGES the industry to actively participate and contribute to these measures;~~

17. INVITES the Commission to regularly keep the Council informed about the results of these actions and initiatives.
